

**Directions:** Please complete shaded areas below.

**Department Name:** Finance  
**Project Name:** Occupational License System  
**Project Amount:** \$200,000  
**Preparer Name & Contact Information:** B. John D'Auria, 305-375-1944

## Section B (Complete Only If Asking for Revenue from GF Capital or IT Administrative Fee)

### Improves Customer Service

Describe how the other customer departments will be better served by implementing this initiative.

*As the prime source of County's General Fund revenue, as well as other special revenues including over \$60m annually in Convention & Tourism tax revenue and over \$70m in Occupational License revenue, the Tax Collector plays a crucial role by collecting and distributing this revenue that funds County departments and initiatives. Beyond this, it should be noted that we are the number one collection source for the school board, other municipalities, special taxing districts, Solid Waste and various state agencies. A new Occupational License system integrated with the new Ad Valorem tax system will help improve revenue flow, help various departments served by the general fund, municipalities, school board, tax authorities, state agencies and speed the flow of funds to the Beacon Council. The better we manage collections and cash flow, the quicker distributions can be made. With collections totaling \$2.8 billion dollars, efficient transaction processing is paramount to all the above mentioned.*

### Impacts Citizens

Describe how this initiative will simplify or enhance doing business with the County. Also state how this will enhance public perception

*This initiative will better serve our customers by providing Occupational License online web based services. Business owners will be able to apply for Occupational Licenses, research account information, pay outstanding fees and renew licenses that have expired. Our customers will be offered online services consistent with those of our other initiatives – for example, real estate property taxes, personal property taxes and Convention and Tourism taxes. Our goal is to provide comprehensive online information and payment services for all the services offered by this office. By offering our services on the web, our customers will appreciate that this office is using modern technology to improve customer convenience.*

### Improves Business Processes

State how this project will lower costs, speed up key business processes, and/or improve decision making ability. Also indicate if the initiative will improve employee morale, communication, and/or education.

*Interactive online Occupational License account applications will increase customer convenience and reduce the need for Occupational License employees' involvement in the process. Employees' time could then be utilized more effectively e.g. by collecting overdue license fees by phone. Real time availability will improve our service to customers and improve online research capabilities and accuracy. We intend to interface the new system with Procurement so that we will automatically be informed of new County vendors who are required to purchase an Occupational License. Flexible report creation will enable more useful reports to be more easily put together thereby improving our decision making processes and field collections.*

#### **Strategic Alignment to the County's Goals**

Describe how this IT Investment lines up with the realization of the County's goals and objectives.

*Department-related Strategic Plan Goal ES8 states "to ensure the financial viability of the County through sound financial management practices." The new Occupational License system will support this goal in terms of Strategic Plan Priority Outcome ES8-5 "Effective County Tax Collection and property appraisal process". An up to date Occupational License system is as essential for the efficient operation of the Tax Collector's Office.*

#### **Departmental Participation**

State if this project crosses departmental boundaries. Indicate how many other departments will participate in the initiative. Please specify which departments and funding commitments if any.

*The system itself will cross departmental boundaries as well as integrating with the Ad Valorem property tax system. It will afford improved compatibility and integration with other departments such as Procurement and thereby help to increase Occupational License revenue. By working with the Geographic Information System (GIS), we will be able to generate efficient routing schedules for field Enforcement/Collection officers. Also, we will more efficiently conduct collection campaigns for targeted areas of the County. By working with the Property Appraiser, we will take advantage of the improved system functionality that up-to-date systems provide. By integrating with FAMIS, we will improve internal processing efficiencies.*

#### **Risks**

Indicate any risks involved to include procurement delays, personnel delays, and environmental delays to include change of technology, vendors, etc.

*There may be some issues regarding system customization. Miami-Dade County tax collection differs from that of other counties in two ways: volume of data and unique county ordinances. At this time this office is proposing a series of amendments to the Occupational License Ordinance. The major objective of these changes is to improve efficiency by simplifying tax assessment and utilize modern practices and procedures to enhance customer service. Ordinance simplification should reduce the level of risk associated with system customization which could otherwise increase costs and cause programming associated delays.*

#### **Use of an Enterprise Infrastructure**

Will this solution utilize an enterprise infrastructure already in place (yes or no)? Please explain.

*Yes. The new system will utilize the County's enterprise internet site management system (Interwoven's Teamsite), and the online payment engine. It will also utilize the GIS, as explained above and be linked to the system utilized by the Department of Procurement Management. Finally, it will also communicate directly with our enterprise financial system, FAMIS.*

## Section C

### Financial Information

ETSD Dependencies (See Budget Manual)	FY04-05	FY05-06
Infrastructure	0	\$10,000
Application Programmer	0	\$10,000
Database	0	\$22,000
Telecommunication	0	0
Radio	0	0
Etc.	0	0

Department Specific Costs	FY04-05	FY05-06
Personnel	0	0
Hardware	0	\$25,000
Software	0	\$125,000
Maintenance Fees	0	\$8,000
Consultant Fees	0	0
Etc.	0	0